Dan Cassara

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Education

Master of Public Administration in Environmental Science and Policy
Columbia University School of International and Public Affairs (2025)

Bachelor of Arts, Economics
University of Chicago (2016)

Work Experience

Consultant, Current Energy Group, (July 2025 - Present)

- Conduct financial analysis on policy, regulation, and tariffs for utility policy and regulatory proceedings

Graduate Student Consultant, Clean Tomorrow, (January 2025 – May 2025)

- Manage a team of graduate student consultants producing a research report and policy briefs outlining how state-level policies such as Community Benefit Agreements impact the accrual of benefits to communities from the development of clean energy
- Lead client engagements, interview key stakeholders such as academic experts, project developers, and community organizers, edit reports and briefs, build and iterate on a work plan for the team, and present key findings to the client

Project Manager Financial Inclusion, Center for Effective Global Action – University of California, Berkeley (August 2021 – May 2024)

- Managed a portfolio of 25 research projects with an active budget of $2.3M, maximizing the value of research funding for insights and policy impact; ensuring accurate and timely reporting; and attracting additional funding
- Co-authored research synthesis report on the impacts of small digital loans and presented the findings at three conferences and five industry network gatherings
- Authored research summaries, thought leadership articles, and policy briefs, driving a 19% increase in newsletter subscribers and 55% increase in website readership
- Co-led center-wide efforts to streamline Salesforce data tracking and reporting for all key performance indicators, implementing a center-wide quarterly performance reporting process

Senior Associate, Financial Institutions Group, Dimensional Fund Advisors (DFA) (January 2019 - August 2021)

- Deepened key national and global partnerships, such as with Goldman Sachs and TIAA, through proactive communication, cross-departmental collaboration, and senior management engagement

- Helped generate $1M in gross sales weekly by collaborating with leadership on strategic protocols for expanded relationship rollouts such as adding 25 new funds to Edward Jones' $250B Guided Solutions platform
- Co-authored white paper on the global private bank landscape, providing insights on market trends, distribution frameworks, competitive threats, and recommendations to position DFA for growth
- Fostered career development of new team members as a formal mentor or manager, elevating contributions, delivering constructive feedback, and supporting internal networking

Associate, Bank Trust Group, Dimensional Fund Advisors (DFA) (August 2016 - December 2018)

- Serviced 50+ client relationships representing ~$8B in assets through investment analysis, marketing support, and continued education on Dimensional's research and investment strategies
- Conceptualized and implemented a new business development program, resulting in 50 prospect engagements, 10 new clients, and $300M+ net positive cash flow in the first 18 months
- Completed rigorous portfolio analyses to identify asset class opportunities and win new business